



platform for the implementation of NAIADES

European Reference Data Management Service (ERDMS)

Usermanual

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1. INTRODUCTION

1.1. General

This user manual describes the use of the “European Reference Data Management Service” (the User role). The user of the application is the responsible reference data representative for ERI in each country, i.e. the person who enters and requests the mutations on the reference data used in ERI & NtS.

In general terms, ERDMS produces mutations in the reference data that is used by a variety of users in various navigation systems. The mutations are entered by authorised users then validated and accepted by the designated Data Manager, after which they are finalised in the system and published.

The process is outlined below:

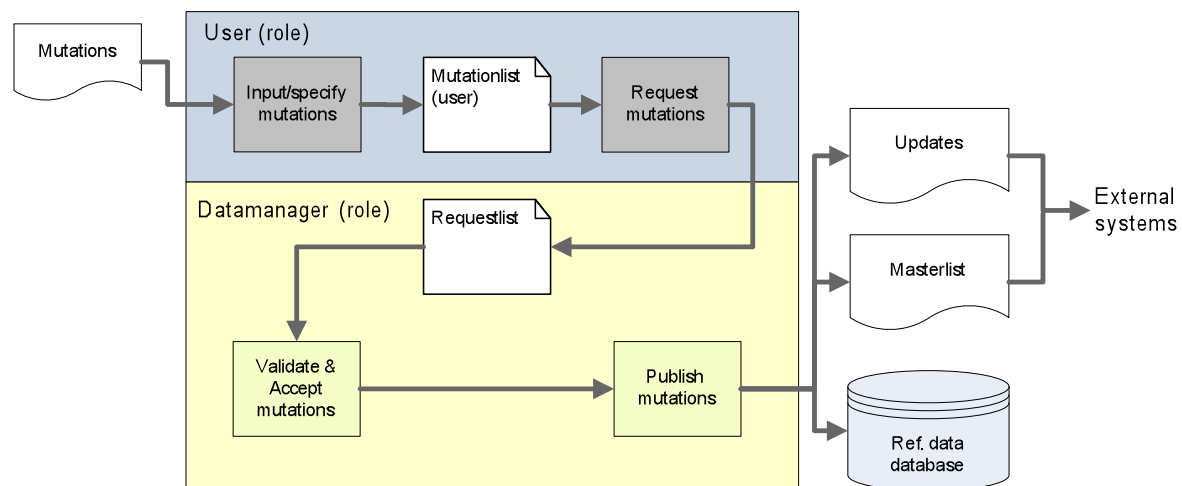


Figure 1: Reference Data Management – Tool, system context

In this manual only the “User” role will be explained (upper part of diagram in Figure 1). The manual expects some knowledge about ERI (Electronic Reporting) and the purposes of the several codes (see also the short data type description in the appendix).

The manual starts with a general description and how to Login (par. 2.3), including the Home page (par. 2.4). Paragraph 2.5 describes how to enter new mutations or edit existing data and request mutations. Finally some additional functions are described, such as Searching, Import & Export mutations and Dumping (par. 2.9) the Master data (=actual reference data/codes).

2. USER MANUAL

2.1. General

This manual describes how users should use the application. A user is defined as the person who submits mutation requests to the Administrator (see Figure 1).

There is a separate manual for the Administrator / Data Manager

This document describes the manual for the European Reference Data Management Service. The text and figures are based on version 1.2 (March 2011) of the application.

2.2. Start up

URL ERDMS

The ERDMS is opened by typing the following URL in the internet browser address bar:

<http://reftool.risexpertgroups.org>

On the left side of the Login screen some links are available (you don't have to log in to access them). The most important ones are:

- *Masterdump*
will return a dump of the records of a selected datatype (see par 2.9).
- *ERI Datamanager*
Can be used to send an email to the data manager.

Start

Depending on the users authorisation, he can log in as a user or administrator in the Login screen. Normally Users will have only the User role and can only enter & request mutations as described in this manual.

2.3. Login

The Login screen displays the following fields:

- User name: <<enter user name here>>
- Password: <<enter password here>>

Click on the “Login” button to start the login procedure.

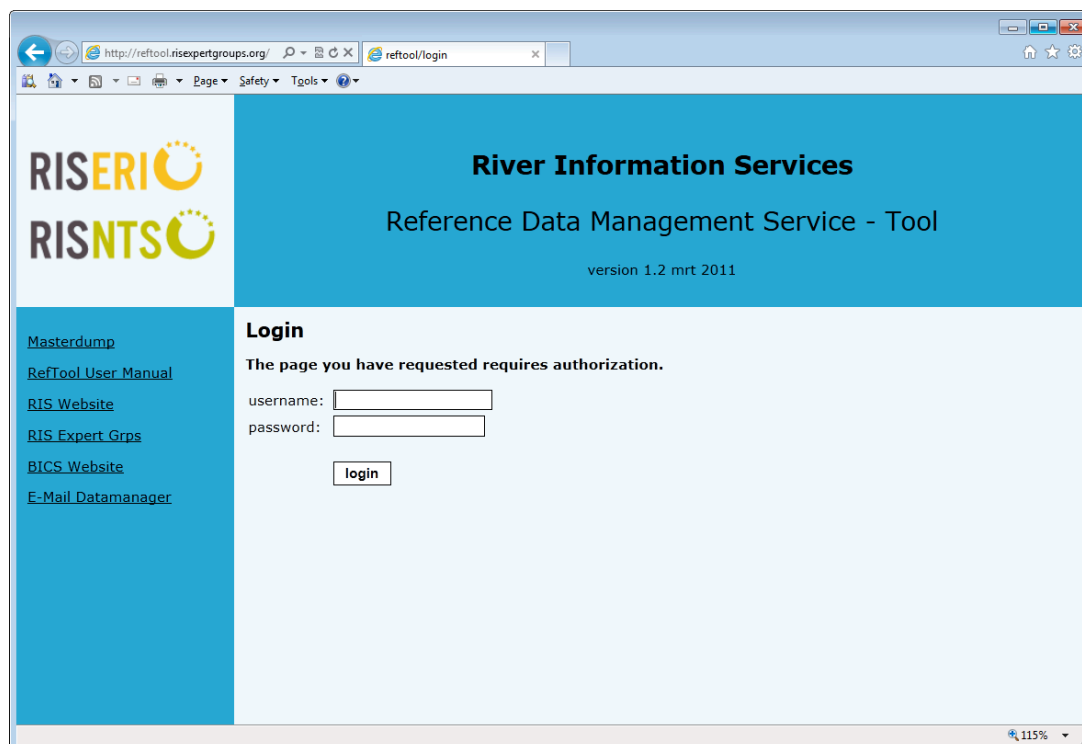


Figure 2: Login screen

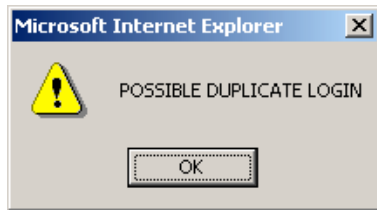
If login succeeds, the user homepage will be displayed (see paragraph 2.4).

If the login information is incorrect, the following message will appear:



Click on “OK” to return to the Login screen.

The following message appears if the user is already active or logged in:



Click on “OK” to continue using the tool or choose the logout link (upper right corner) to stop.

(duplicate login could result in strange behaviour when editing & saving the same data)

2.4. Homepage

After login the User Homepage will be displayed.

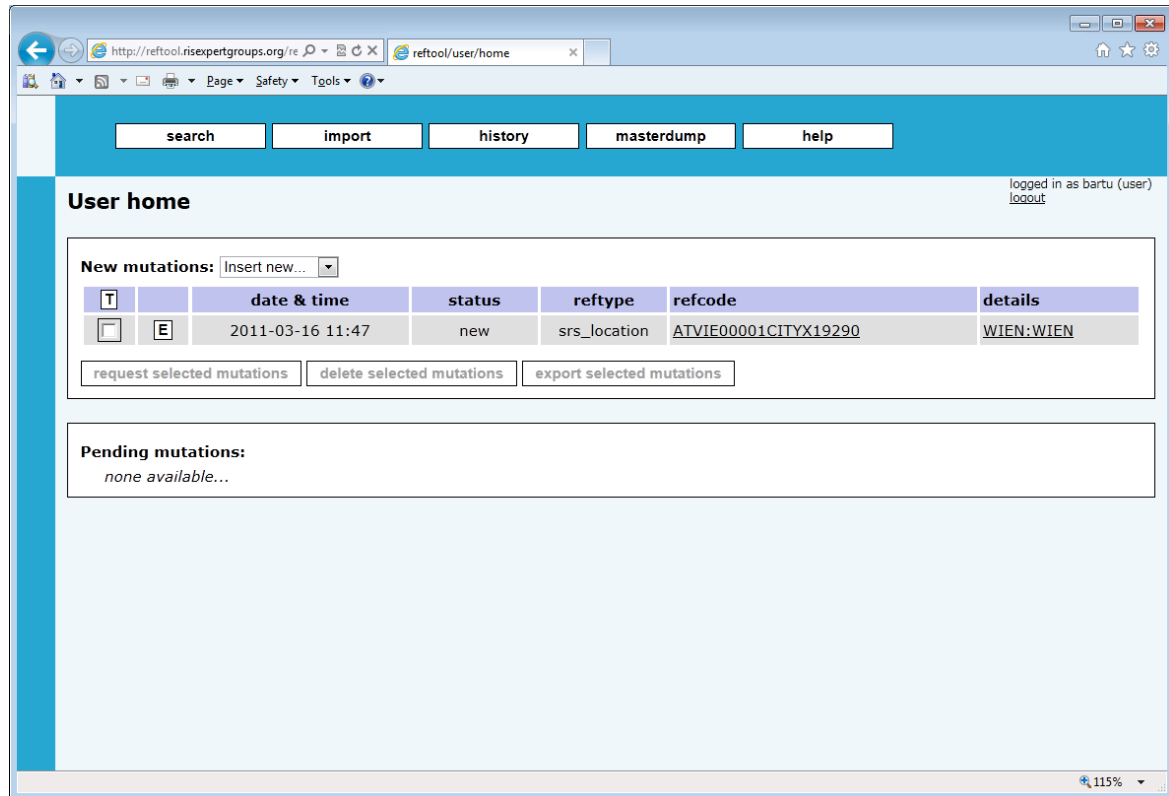


Figure 3: Homepage

From within this Homepage you can activate the following functionalities:

- Enter new reference data ('new mutations'), see paragraph 2.5
- Search for specific existing data (existing data can be used to specify a new mutation, change or addition), see paragraph 2.6
- Edit, Delete and Request mutations ('pending mutations'), see paragraph 2.7
- View your history (what was entered and what happened to it), see paragraph 2.7
- Import mutations, see paragraph 2.8
- Request a Masterdump (all data of a specific data type), see paragraph 2.9

2.5. Enter data, new mutations

Enter new reference data (mutations) – define category

New reference data can be entered by selecting a category from a drop-down menu.

Srs_location is one of the possible category options:

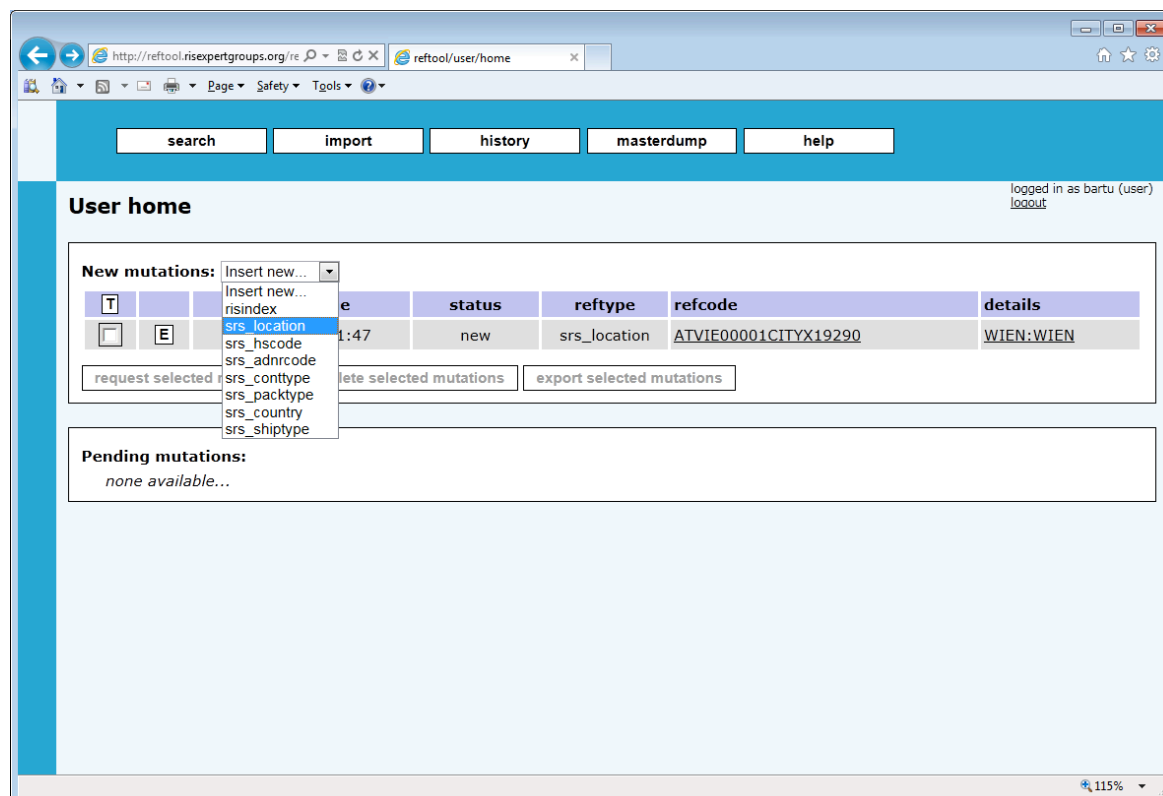
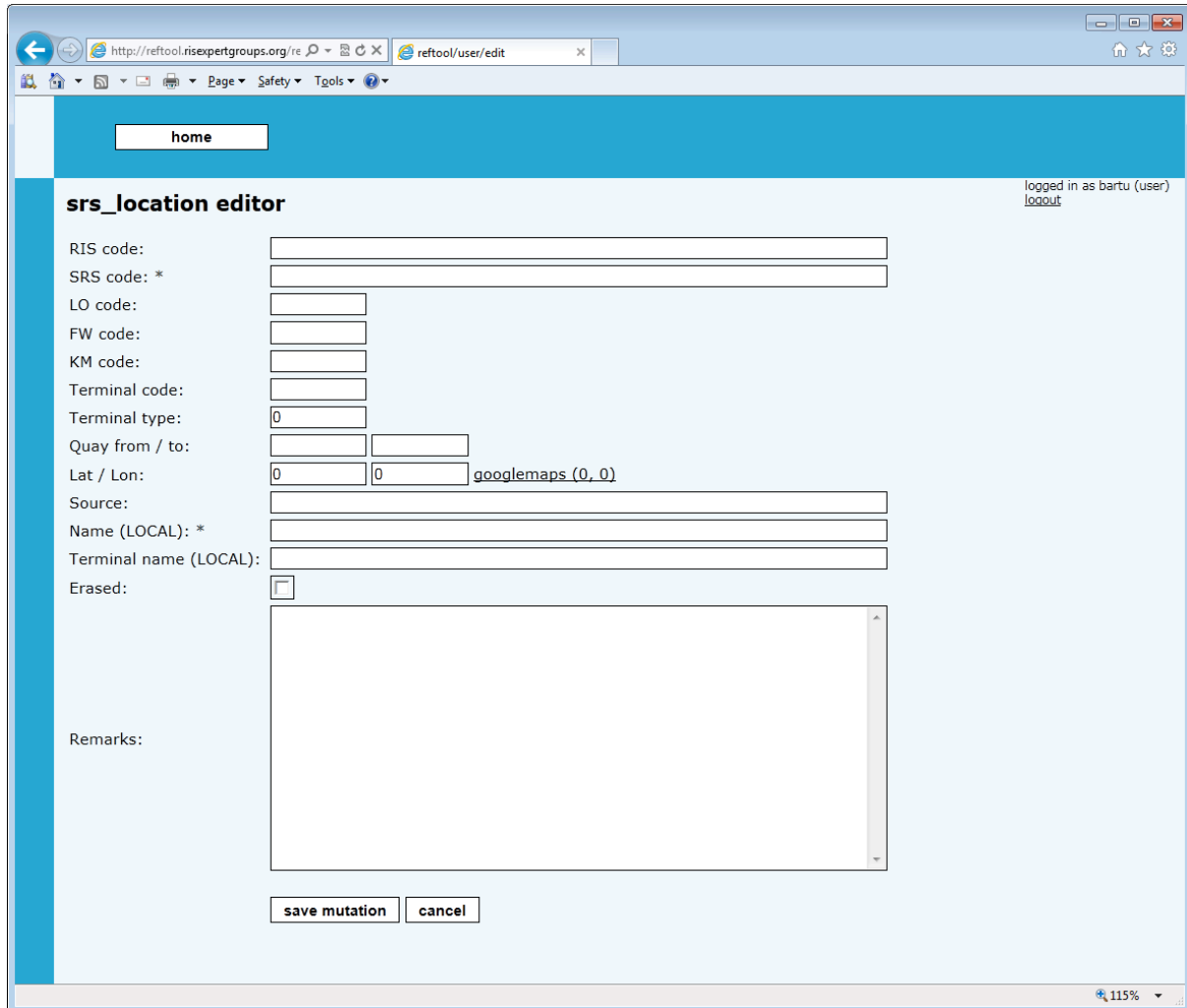


Figure 4: Choosing the data category to insert

Enter new reference data – populate fields

The system displays the empty fields that need to be filled in when submitting a request for new reference data:



The screenshot shows a web browser window with the URL <http://reftool.risexpertgroups.org/re> and a tab titled 'reftool/user/edit'. The page has a blue header with a 'home' button. The main content area is titled 'srs_location editor' and shows a form for entering new reference data. The form includes the following fields and controls:

- RIS code:
- SRS code: *:
- LO code:
- FW code:
- KM code:
- Terminal code:
- Terminal type:
- Quay from / to:
- Lat / Lon: [googlemaps \(0, 0\)](#)
- Source:
- Name (LOCAL): *:
- Terminal name (LOCAL):
- Erased: ☐
- Remarks:

At the bottom of the form are two buttons: 'save mutation' and 'cancel'. The browser window shows the user is logged in as 'bartu (user)' with a 'logout' link.

Figure 5: Enter new mutation

Normally at least the Code and the Name field has to be filled in. Those fields are mandatory. The optional field can (must) be filled in if the information is available. Otherwise the Data Manager has to complete these fields or he will request extra information and it will take longer to process your requests.

Mandatory field are marked with an asterisk (*).

Use the 'save mutation' button to save your new entry. ERDMS will return to your Homepage, where you can see the entered mutation (see Figure 3: Homepage).

Paragraph 2.7 of this manual describes how mutations can be edited and requested (send to the data manager).

2.6. Search for (and edit) existing reference data

The “Search” option can be used to search for reference data that already exists. Onwards this data can be viewed, edited or copied.

Select the ‘Search’ button in the upper left corner of the Home Page, to enter the search-screen:

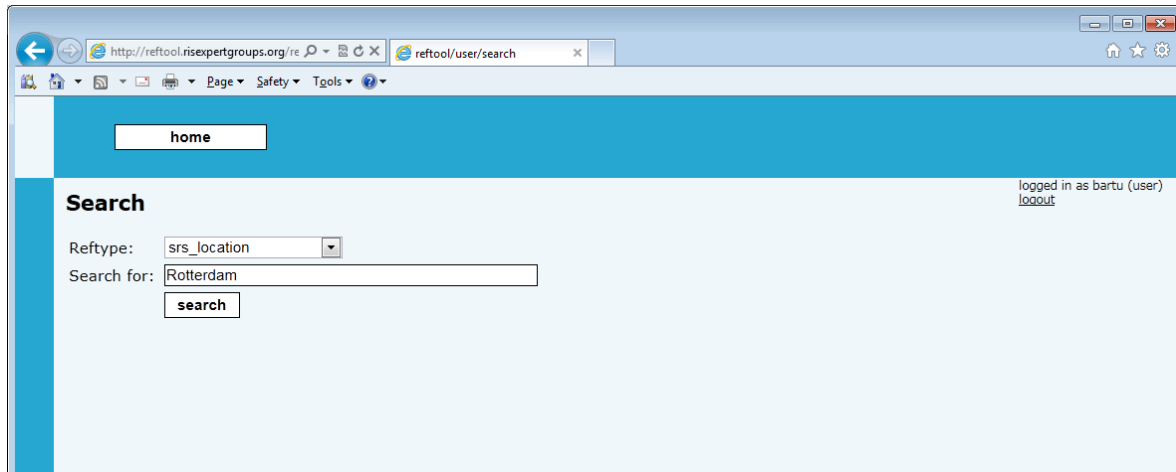
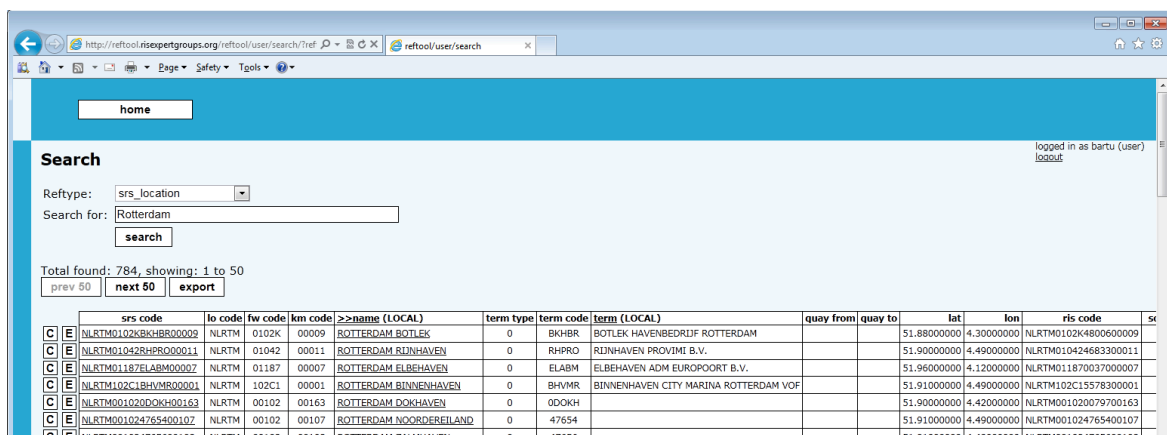


Figure 6: Search

Select a category under the “Reftype” field and enter a search criteria in the ‘Search for’ field.

Click on the ‘Search’ button to start the search process.

The search results are displayed in a table:



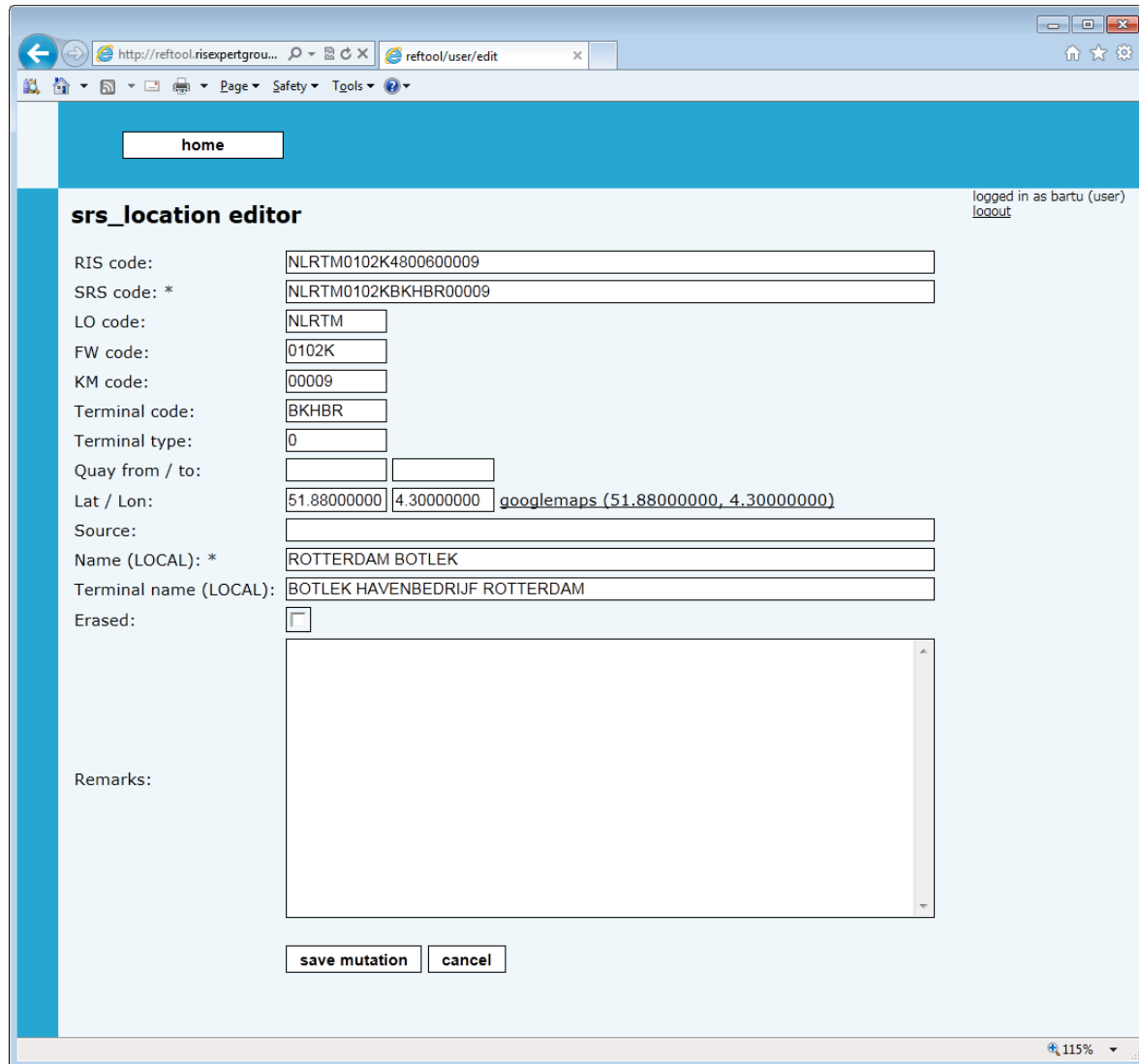
	srs code	lo code	fw code	km code	>>name (LOCAL)	term type	term code	term (LOCAL)	quay from	quay to	lat	lon	ris code	sr
C	E	NLRTM0102K8KHBR00009	NLRTM	0102K	00009	ROTTERDAM BOTLEK	0	BKHB	BOTLEK HAVENBEDRIJF ROTTERDAM		51.88000000	4.30000000	NLRTM0102K4800600009	
C	E	NLRTM01042RHPR000011	NLRTM	01042	00011	ROTTERDAM RIJNHAVEN	0	RHPR	RIJNHAVEN PROVIMI B.V.		51.90000000	4.49000000	NLRTM010424683300011	
C	E	NLRTM01187ELABM000007	NLRTM	01187	00007	ROTTERDAM ELBEHAVEN	0	ELAB	ELBEHAVEN ADM EUROPOORT B.V.		51.96000000	4.12000000	NLRTM011870037000007	
C	E	NLRTM0102C1BHVMR000001	NLRTM	102C1	00001	ROTTERDAM BINNENHAVEN	0	BHVM	BINNENHAVEN CITY MARINA ROTTERDAM VOF		51.91000000	4.49000000	NLRTM0102C15578300001	
C	E	NLRTM001020DOKH00163	NLRTM	00102	00163	ROTTERDAM DOKHAVEN	0	ODOK			51.90000000	4.42000000	NLRTM001020079700163	
C	E	NLRTM001024765400107	NLRTM	00102	00107	ROTTERDAM NOORDEREILAND	0	47654			51.91000000	4.49000000	NLRTM001024765400107	
C	E	NLRTM001024765600108	NLRTM	00102	00108	ROTTERDAM 7de MEIHAVEN	0	47656			51.91000000	4.49000000	NLRTM001024765600108	

Figure 7: Search results

The details of a record can be shown by clicking on the underlined ‘Refcode’ or ‘Name’-field.

Edit existing reference data (change existing records)

Existing reference data can be edited by clicking the edit-button (E) in front of the record. The editor-screen will appear:



home

logged in as bartu (user)
logout

srs_location editor

RIS code:

SRS code: *

LO code:

FW code:

KM code:

Terminal code:

Terminal type:

Quay from / to:

Lat / Lon: [googlemaps \(51.88000000, 4.30000000\)](#)

Source:

Name (LOCAL): *

Terminal name (LOCAL):

Erased: ☐

Remarks:

115%

Figure 8: Edit existing reference data

Here you can adjust the updated properties of the reference data record. After entering the updated data, click the 'save mutation' button to save a mutation, resulting in a so called change mutation request for that record. Reftool will return to your homepage, where the mutation is added to the 'New mutations' table.

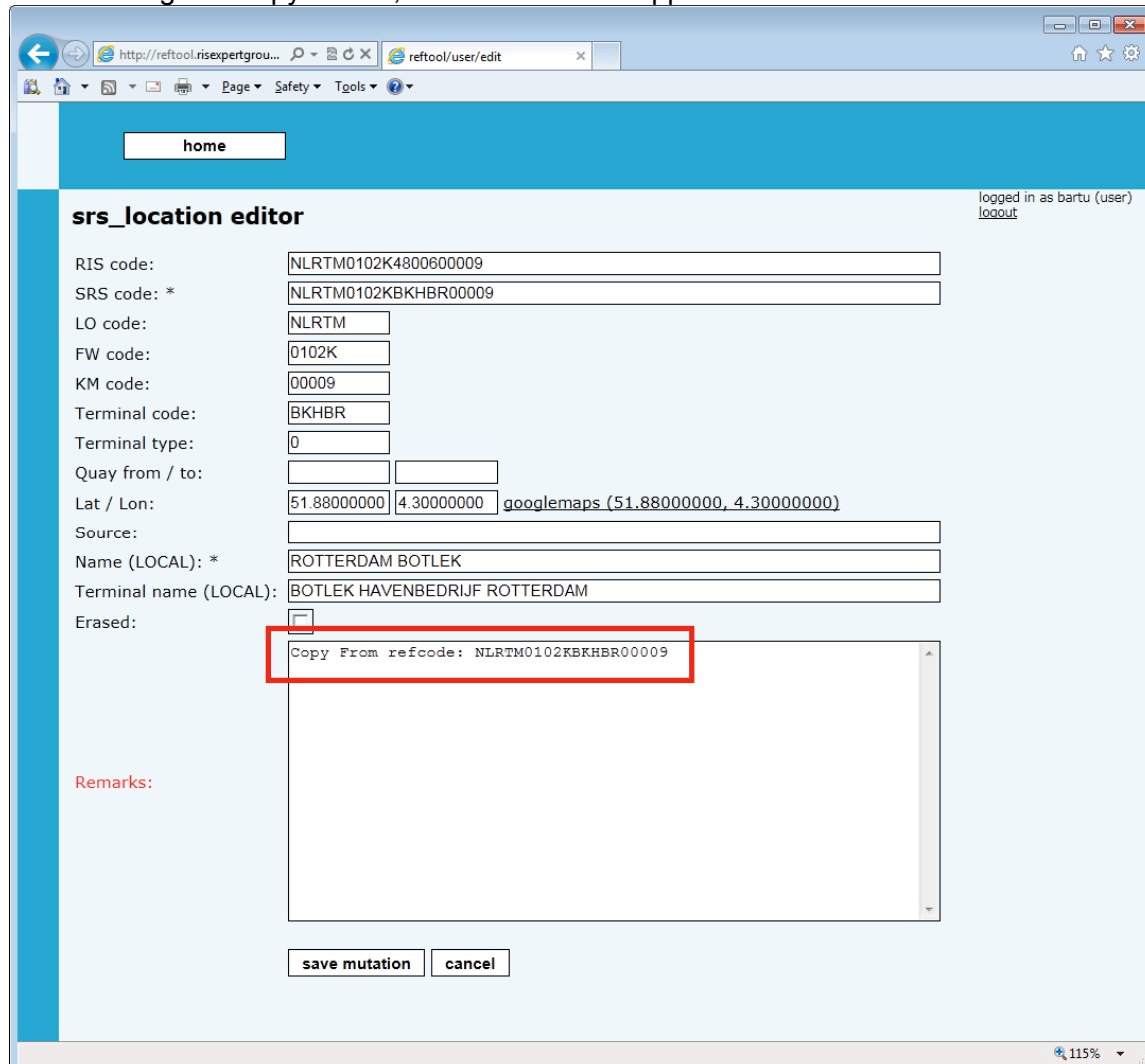
- ➔ If a record is to be deleted, just check the 'Erased'-checkbox and click 'save mutation'.

Paragraph 2.7 of this manual describes how mutations can be edited and requested (send to the data manager).

Copy existing reference data (add new records)

Sometimes it's more efficient to copy an existing record in stead of inserting a new (blank) mutation. To do so, click the 'Copy'-button (C) which is located in front of each record in the search results table (see Figure 7: Search results).

After clicking the Copy-button, the editor screen appears:



The screenshot shows a web browser window with the URL `http://reftool.risexpertgrou...` and a tab titled `reftool/user/edit`. The page has a blue header with a 'home' button and a 'logged in as bartu (user) logout' link. The main content area is titled 'srs_location editor'. It contains the following fields:

- RIS code:
- SRS code: *
- LO code:
- FW code:
- KM code:
- Terminal code:
- Terminal type:
- Quay from / to:
- Lat / Lon: [googlemaps \(51.88000000, 4.30000000\)](#)
- Source:
- Name (LOCAL): *
- Terminal name (LOCAL):
- Erased: ☐

A red box highlights the text 'Copy From refcode: NLRTM0102KBKHB00009' which is displayed below the 'Erased' checkbox. Below this is a large text area for 'Remarks:'. At the bottom of the form are two buttons: 'save mutation' and 'cancel'.

Figure 9: Copy existing reference data (insert new record)

Now you can edit the properties of the copied record, to specify your new, unique, record.

The 'Remarks'-field contains a note that the record was copied from an existing record. Please do not delete this remark, because it is valuable information for the data manager.

When finished editing, click 'Save mutation' to save your new record, resulting in a so called new mutation request (record to add). Reftool will now return to your homepage, where the mutation is added to the 'New mutations' table.

Paragraph 2.7 of this manual describes how mutations can be edited and requested (send to the data manager).

2.7. Requesting mutations

The mutations you have entered are displayed on the homepage:

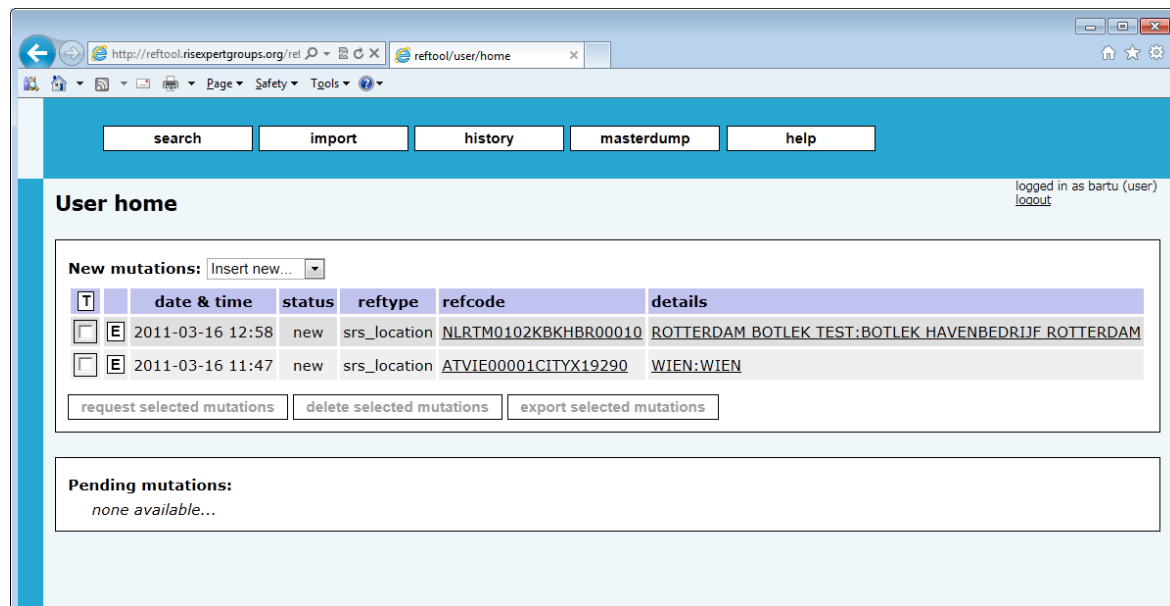


Figure 10: Mutations on homepage

Depending of its status, a mutation is listed as 'New mutation' or as 'Pending mutation'.

New Mutations

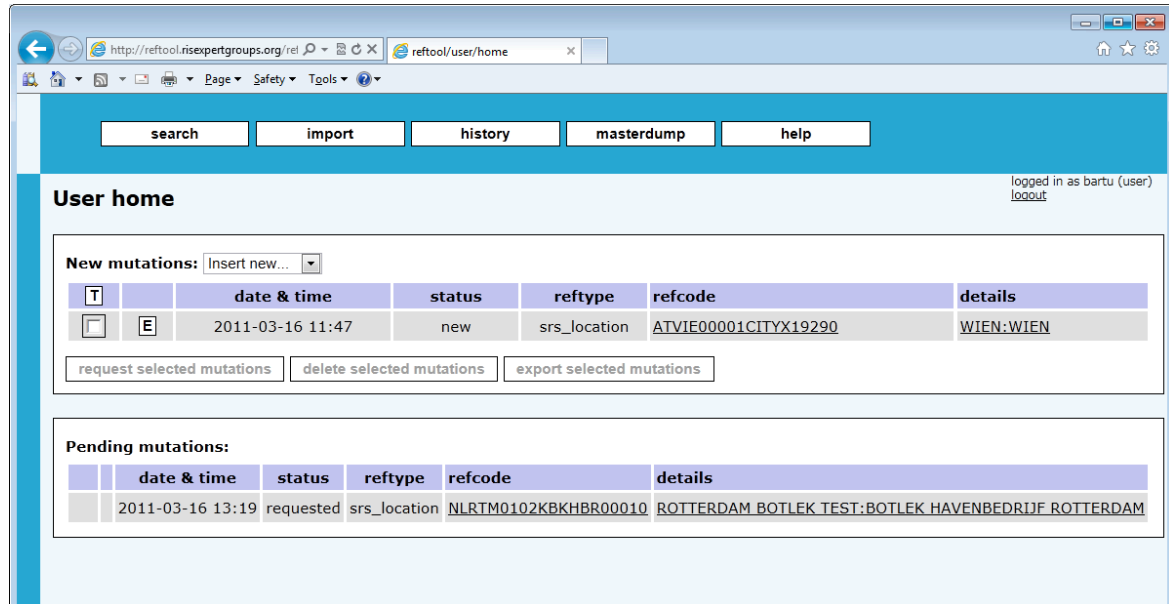
New mutations are those mutations that has not yet been requested to the data manager (will not be visible for the data manager) Each mutation that you save, first appears in this list. Various actions can be applied to the mutations in this list:

- **View details:** view the details of each mutation by clicking the underlined 'Refcode' or 'Details'-fields.
- **Edit mutations:** Edit the mutation by clicking the Edit-button (E) in front of the record.
- **Delete selected mutations:** Select the checkbox in front of the record(s) and click the 'Delete selected records' button.
- **Export selected mutations:** Select the checkbox in front of the record(s) and click the 'Export selected records' button. The records will be exported to a standard comma separated format which can be imported in excel etc.
- **Request selected mutations:** Each mutated reference data record must be sent to the data manager for approval. To do so, select the reference data records concerned by activating the appropriate checkbox(es) and then clicking on 'request selected mutations'. After requesting the mutations you can not edit them anymore and they will be visible for the data manager to be processed.

➔ If you want to request, export or delete multiple mutations, clicking on the 'T' (Toggle current selection) is an alternate selection method. This activates all the checkboxes in the table.

Pending mutations

After a mutation is requested, it is moved to the 'pending mutations' section on the home page:



The screenshot shows the 'User home' page of the reftool application. The page has a navigation bar with buttons: search, import, history, masterdump, and help. The user is logged in as 'bartu (user)' and can click 'logout'. The main content area is divided into two sections: 'New mutations' and 'Pending mutations'.

New mutations:

T		date & time	status	reftype	refcode	details
<input type="checkbox"/>	E	2011-03-16 11:47	new	srs_location	ATVIE00001CITYX19290	WIEN:WIEN

Buttons: request selected mutations, delete selected mutations, export selected mutations

Pending mutations:

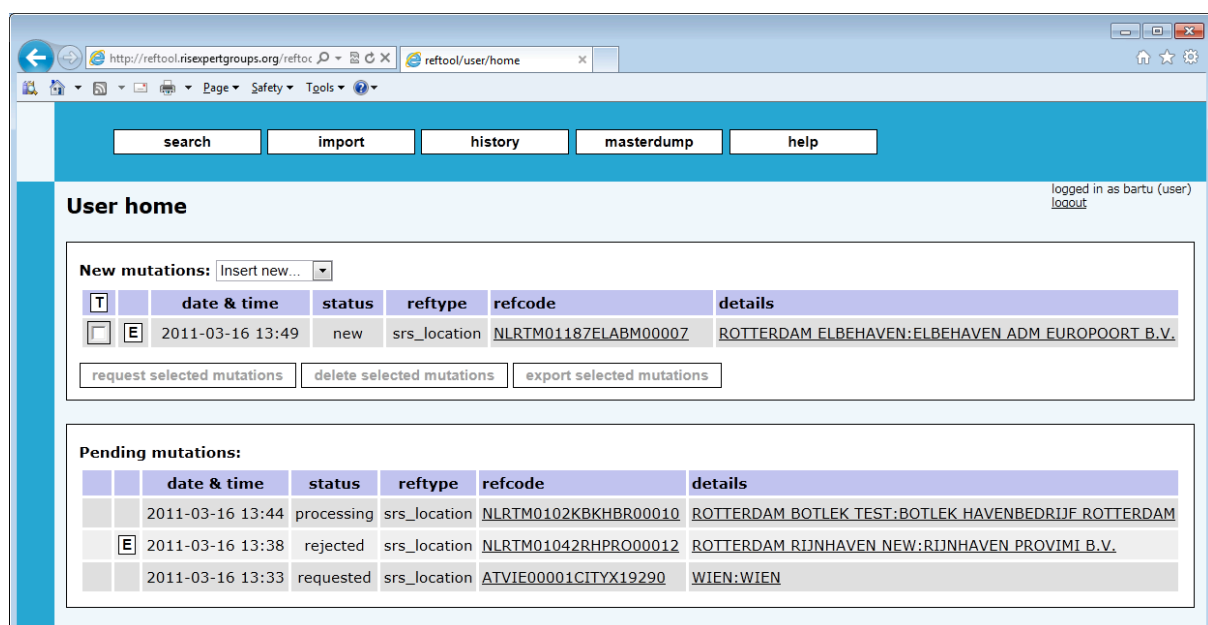
	date & time	status	reftype	refcode	details
	2011-03-16 13:19	requested	srs_location	NLRTM0102KBKHB00010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM

Figure 11: Pending mutations

The mutations in the 'pending mutations' section are sent to the data manager and awaiting approval.

Pending mutations can have different statuses:

- Requested: The mutation is requested to the data manager.
- Processing: The data manager is busy processing the request.
- Rejected: The data manager has rejected the request and you can edit it again.



The screenshot shows the 'User home' page of the reftool application. The page has a navigation bar with buttons: search, import, history, masterdump, and help. The user is logged in as 'bartu (user)' and can click 'logout'. The main content area is divided into two sections: 'New mutations' and 'Pending mutations'.

New mutations:

T		date & time	status	reftype	refcode	details
<input type="checkbox"/>	E	2011-03-16 13:49	new	srs_location	NLRTM01187FLABM00007	ROTTERDAM ELBEHAVEN:ELBEHAVEN ADM EUROPOORT B.V.

Buttons: request selected mutations, delete selected mutations, export selected mutations

Pending mutations:

	date & time	status	reftype	refcode	details	
	2011-03-16 13:44	processing	srs_location	NLRTM0102KBKHB00010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM	
<input type="checkbox"/>	E	2011-03-16 13:38	rejected	srs_location	NLRTM01042RHPR000012	ROTTERDAM RIJNHAVEN NEW:RIJNHAVEN PROVIMI B.V.
	2011-03-16 13:33	requested	srs_location	ATVIE00001CITYX19290	WIEN:WIEN	

Figure 12: Mutation statuses

You can edit a rejected mutation by clicking the Edit button (E) in front of the record. In the edit screen a comment from the data manager is added in the 'remarks' field.

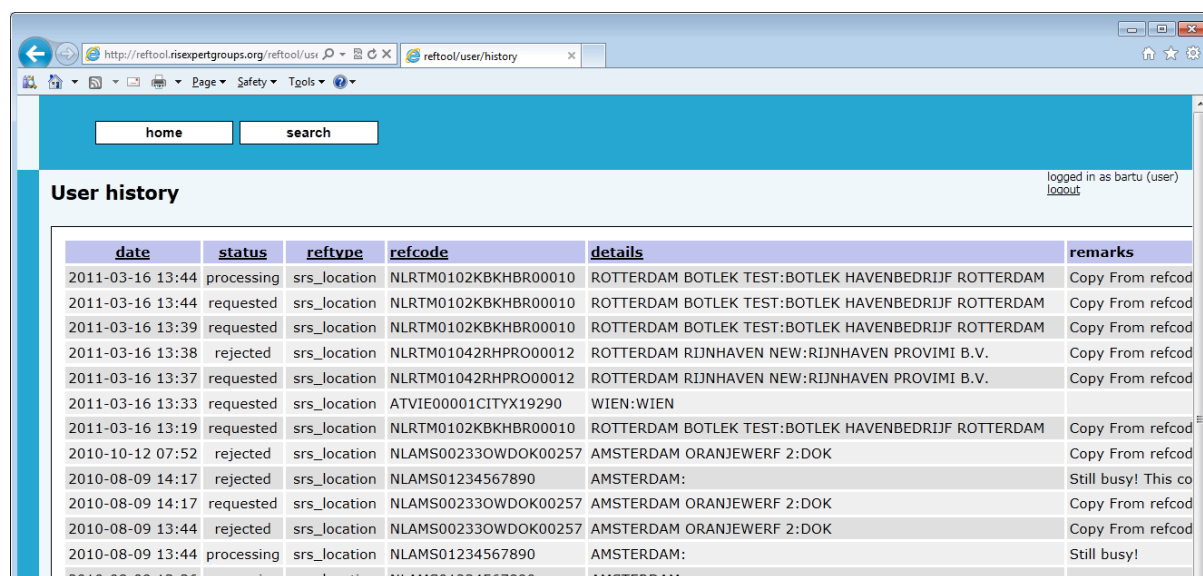
You can delete the rejected mutation now from the edit screen (click 'delete mutation') or, after completing / changing the data, save the mutation. The mutation will now be relocated to the 'new mutations' section of the homepage. If you want to request the mutation again, just select it and click the 'request selected mutation' button.

- ➔ Requested mutations that have been accepted by the data manager will be removed from the 'pending mutations' section. These mutations can be found in the 'User history' screen.

User History

The 'history' button is available on the homepage (see Figure 12 on previous page).

The "History" button allows you to view the history of your own new or mutated reference data. However it is not possible to call up any details via this screen. Mutations that have been accepted by the data manager, will be shown in this screen. These mutations can be recognised by their status: 'Accepted'.



date	status	reftype	refcode	details	remarks
2011-03-16 13:44	processing	srs_location	NLRTM0102KBKHBRO0010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM	Copy From refcod
2011-03-16 13:44	requested	srs_location	NLRTM0102KBKHBRO0010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM	Copy From refcod
2011-03-16 13:39	requested	srs_location	NLRTM0102KBKHBRO0010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM	Copy From refcod
2011-03-16 13:38	rejected	srs_location	NLRTM01042RHPRO00012	ROTTERDAM RIJNHAVEN NEW:RIJNHAVEN PROVIMI B.V.	Copy From refcod
2011-03-16 13:37	requested	srs_location	NLRTM01042RHPRO00012	ROTTERDAM RIJNHAVEN NEW:RIJNHAVEN PROVIMI B.V.	Copy From refcod
2011-03-16 13:33	requested	srs_location	ATVIE00001CITYX19290	WIEN:WIEN	
2011-03-16 13:19	requested	srs_location	NLRTM0102KBKHBRO0010	ROTTERDAM BOTLEK TEST:BOTLEK HAVENBEDRIJF ROTTERDAM	Copy From refcod
2010-10-12 07:52	rejected	srs_location	NLAMS00233OWDOK00257	AMSTERDAM ORANJEWERF 2:DOK	Copy From refcod
2010-08-09 14:17	rejected	srs_location	NLAMS01234567890	AMSTERDAM:	Still busy! This co
2010-08-09 14:17	requested	srs_location	NLAMS00233OWDOK00257	AMSTERDAM ORANJEWERF 2:DOK	Copy From refcod
2010-08-09 13:44	rejected	srs_location	NLAMS00233OWDOK00257	AMSTERDAM ORANJEWERF 2:DOK	Copy From refcod
2010-08-09 13:44	processing	srs_location	NLAMS01234567890	AMSTERDAM:	Still busy!
2010-08-09 13:36	processing	srs_location	NLAMS01234567890	AMSTERDAM:	

Figure 13: User History

2.8. Import & export mutations

It is possible to import (bulk) mutations, that you have created in other systems, into the ERDMS. This can be done via an import file (e.g. Excel file).

You can also export mutations that you have entered in the ERDMS so you can edit them using other tooling (e.g. Excel or Access).

Export mutations

The export function can be found at the home page, underneath your new mutations:

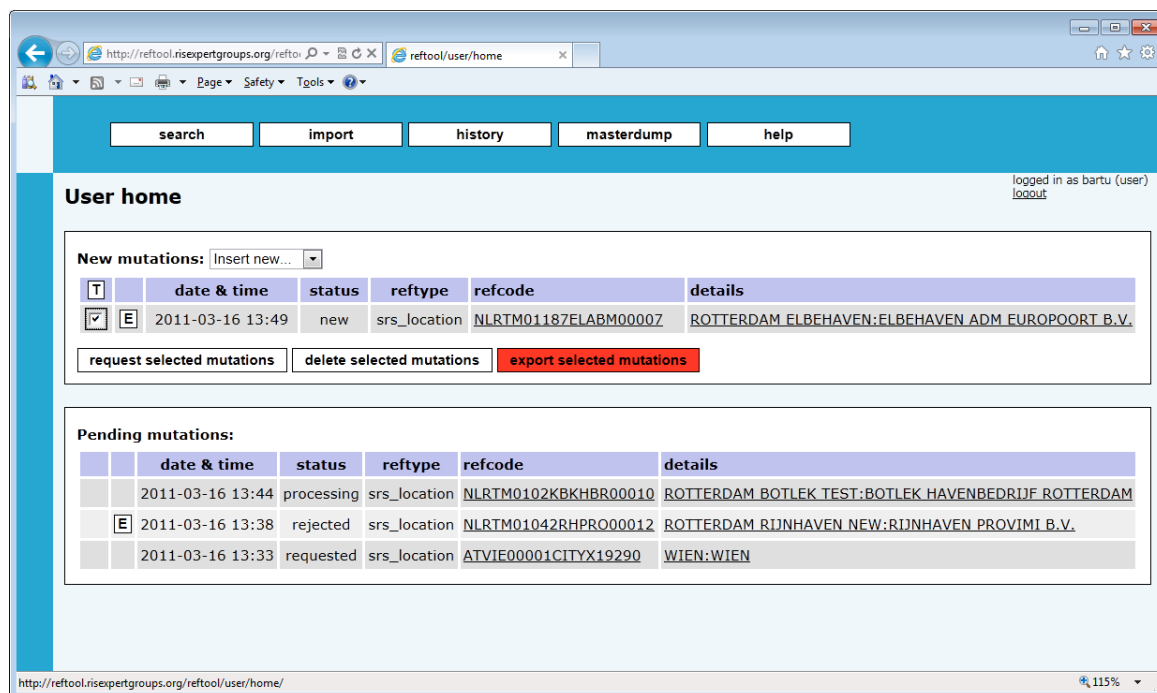


Figure 14: Export mutations

➔ It's best to export mutations of one unique reftype at a time. Only then the exportfile contains headings in line 1.

Import mutations

The import format is the same as the export format and differs per reference data type.

➔ The best way to use this import functionality is to fill in a (dummy) mutation for each data type you want to import (so you can use the export result as an example (template) for the import files). After mutations are available select the ones you want to export. Copy the result into a text file (using notepad) and save it as an .csv file (this can be opened with Excel or Access).

The import function can be reached via the 'Import'-button that is located on the home page.

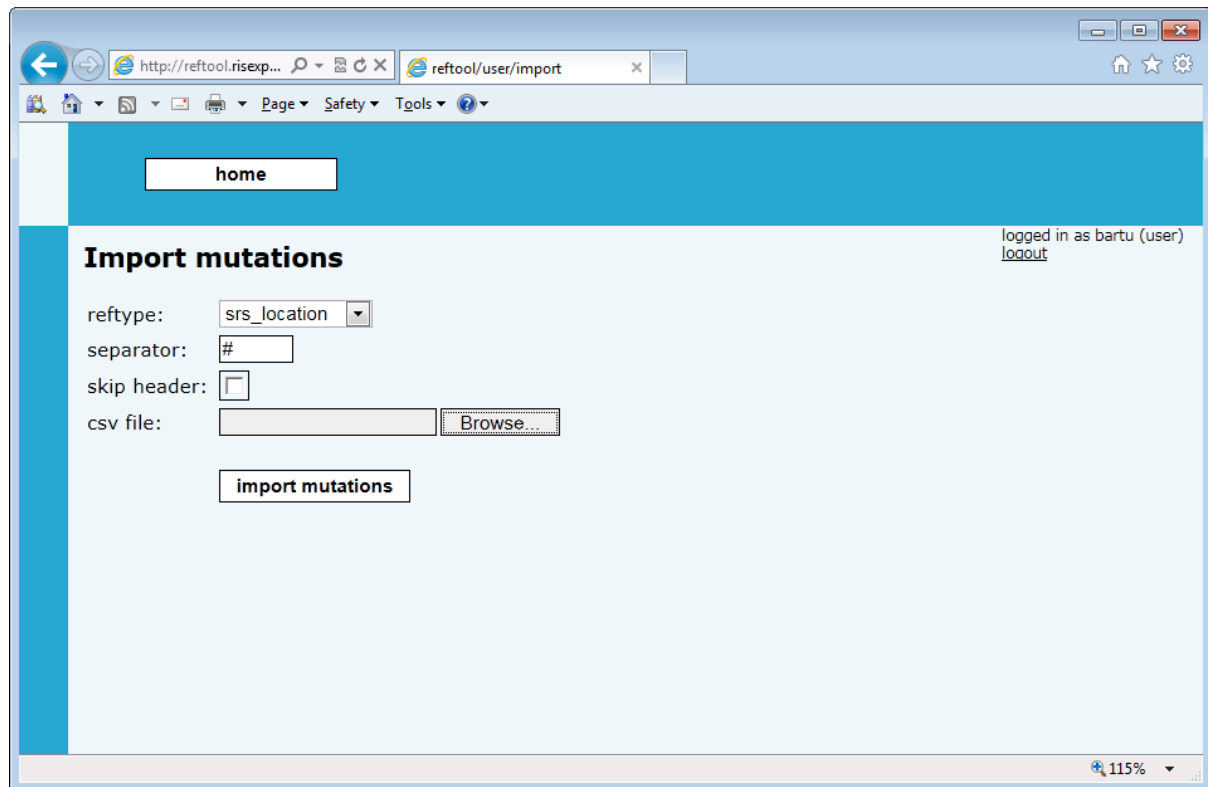


Figure 15: Import (bulk) mutations

To import mutations, it is necessary to configure the following fields:

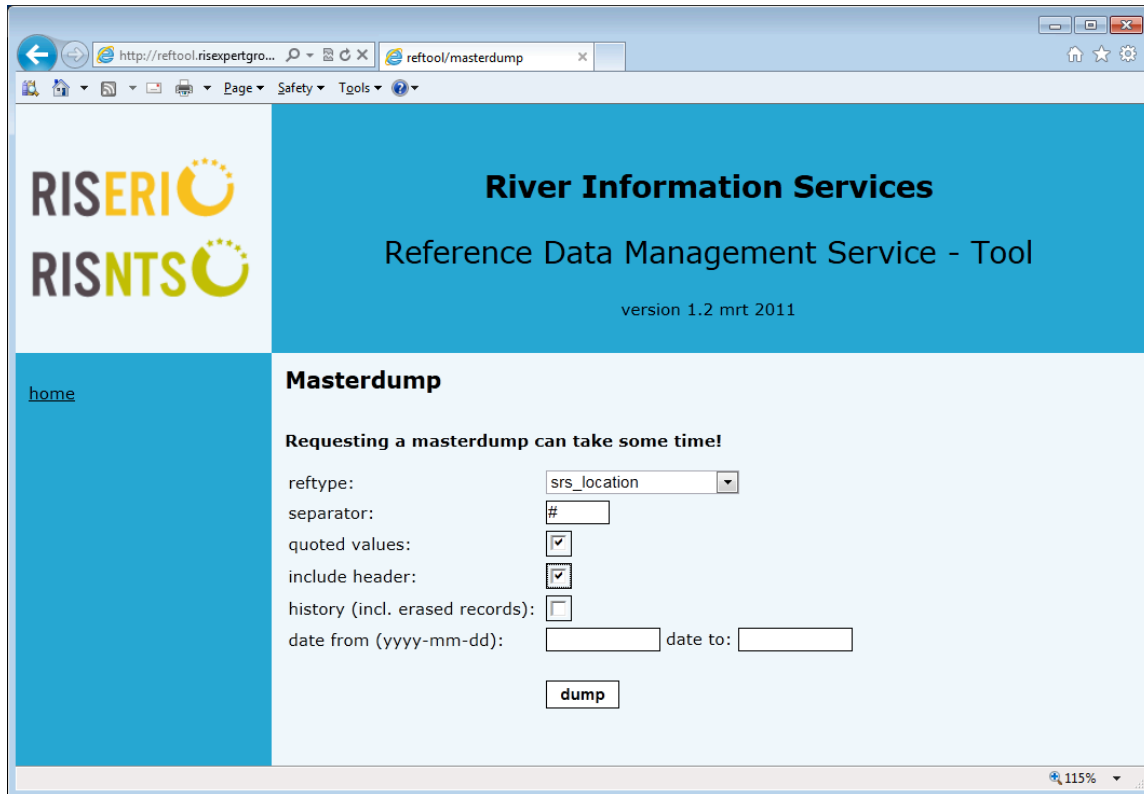
- Reference type
- Separator
- Skip header
- CSV-file name and location

When filling in the “csv file” field, the desired file can be selected using the browse function.

The name of the selected document is displayed in the “csv file” field. Click on the “import mutations” button to import the mutations. If the import process is completed without errors, the system automatically reopens the homepage where the imported mutation is displayed in the ‘new mutations’ list. A message is displayed if an error occurs during the import process.

2.9. Requesting a Master dump

Master dumps can be generated by choosing the 'Masterdump' button in the Homepage or the Master dump link on the login page. It is not necessary to login to create a master dump.



The screenshot shows a web browser window with the URL <http://reftool.risexpertgro...> and a tab titled [reftool/masterdump](#). The page header includes the RISERIO and RISNTSO logos on the left and the title "River Information Services Reference Data Management Service - Tool" with "version 1.2 mrt 2011" on the right. A sidebar on the left contains a "home" link. The main content area is titled "Masterdump" and includes a warning: "Requesting a masterdump can take some time!". Below this is a form with the following fields:

- reftype:
- separator:
- quoted values: ☒
- include header: ☒
- history (incl. erased records): ☐
- date from (yyyy-mm-dd): date to:

A "dump" button is located at the bottom of the form. The browser's status bar at the bottom right shows a zoom level of 115%.

Figure 16: Requesting a Masterdump

Within this screen, it is necessary to configure the following fields:

- Reftype.
- Separator (specify field separator, default "|").
- Quoted values (text field will be quoted with a double quote (")).
- Include Header (field headers will be included on the first row).
- History (erased records (erased=true) will be included).
- Date from and to (records with a last modification date between the specified dates will be included).

After activating the dump, the result will be displayed and can be copied to a text file (save this as a .csv file and you can import it in other systems, databases or in Excel).

2.10. Logout

To log out, click on the “logout” link at the top right of the screen.

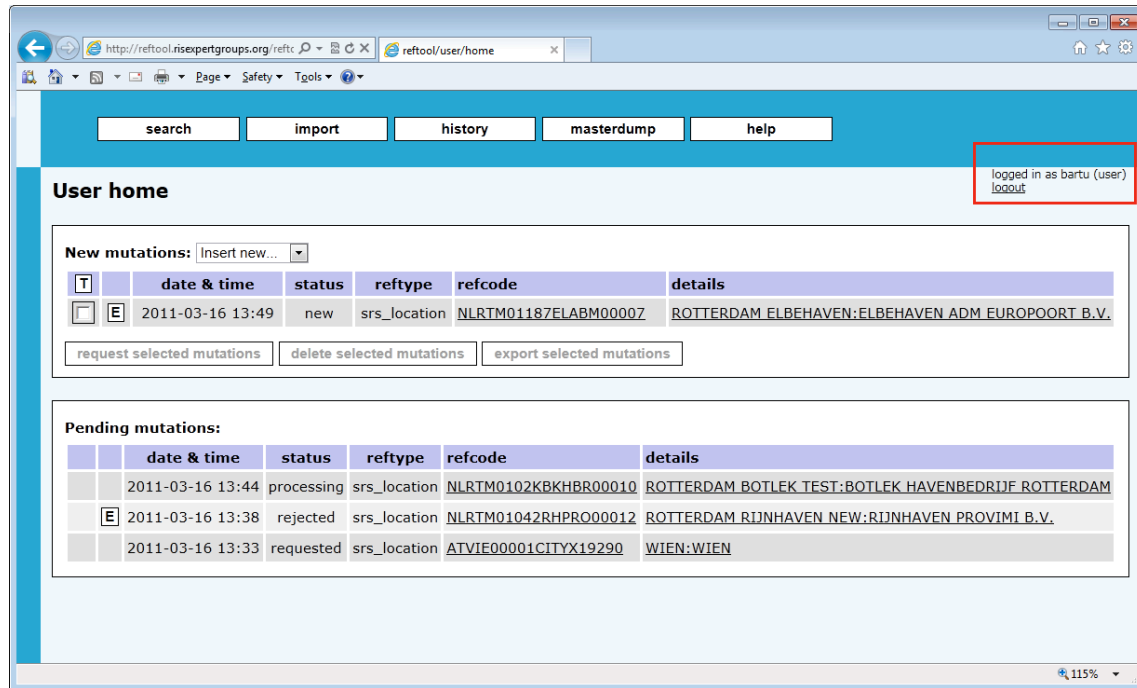


Figure 17: Logout from Tool

After Logout the user will return to the main (login) page.